Company Preferences - Purchasing

Last Modified on 11/13/2024 3:50 pm EST

Purchasing

Under the Purchasing company preference, you will be able to manage your promised dates, purchasing from preferred vendors and drop ship Purchase Orders.

Select the appropriate selection for your Purchasing preference:

- Enable multiple promise dates.
- Limit items for purchasing to items that have the current vendor listed as a preferred vendor.
- Include unapproved purchase orders in an item's summary.
- After creating a Receiver for a drop ship PO, create a corresponding Ship Doc.
- After setting a Receiver for a drop ship PO to Received Status, create a corresponding Ship Doc.

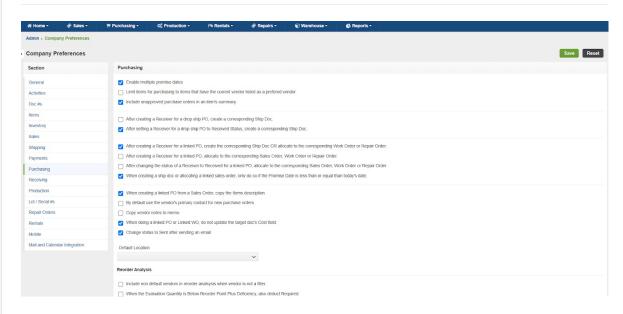
After creating a Receiver for a linked PO, create the corresponding Ship Doc OR allocate to the

- corresponding Work Order or Repair Order.
- After creating a Receiver for a linked PO, allocate to the corresponding Sales Order, Work Order or Repair Order.
- After changing the status of a Receiver to Received for a linked PO, allocate to the corresponding Sales Order, Work Order or Repair Order.
- When creating a ship doc or allocating a linked sales order, only do so if the Promise Date is less than or equal than today's date.
- When creating a linked PO from a Sales Order, copy the Items description
- By default use the vendor's primary contact for new purchase orders
- Copy vendor notes to memo
- When doing a linked PO or Linked WO, do not update the target doc's Cost field.
- Change status to Sent after sending an email.
- Default Location . The default location for all purchase orders. (Dropdown)

Reorder Analysis

• Include non-default vendors in Reorder Analysis when Vendor is not a filter.

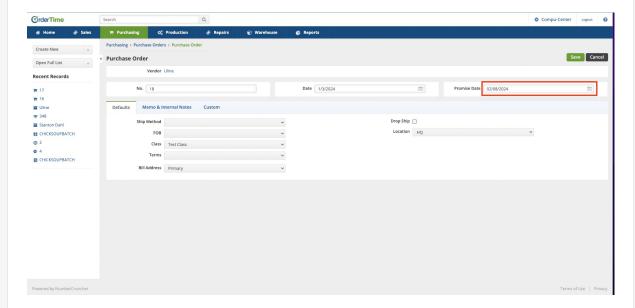
• When the Evaluation Quantity is Below Reorder Point Plus Deficiency, also deduct Required.



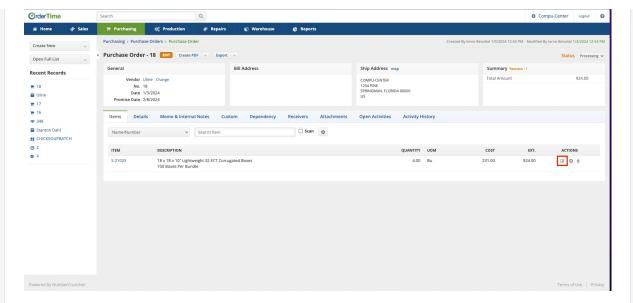
Click Save when done.

Adding Multiple Promise Dates

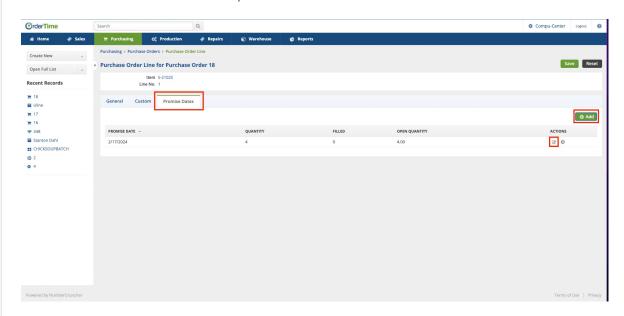
• After the PO has been created, initiate the initial promise date on the PO creation page.



- To add extra promise dates, navigate to the line item editing page.
- Click the "Edit Line Item" button.



- Move to the Promise Dates tab.
- Click "Add" to insert additional promise dates.



Assign the amounts to the respective dates if need be thought clicking the editing button to the of the of the .

• Confirm the changes, and you should be all set.

